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# **Audience:**

Sales Team

# **Goal:**

The objective of the dashboard is to provide the sales team with a comprehensive overview of their team's sales performance and key metrics, to help them make informed decisions and optimize their sales strategy.

## Key Elements:

* **Sales Performance**: Display team sales data categorized by products, states, sales managers, and customers. This assists in providing a comprehensive view of performance across different dimensions.
* **Trends and Relationships**: Analyze data to identify trends, patterns, and insights for sales and products. This is valuable for identifying opportunities to recognize periods of increased product demand, leading to higher sales, and for identifying exceptional product performers that drive both sales and profit growth.
* **Monitor KPIs**: Track key metrics like profit, sales, returns %, avg margin %, and avg discounts %, and avg ship day, enabling viewers to quickly grasp the metrics. It helps in managing and guiding the sales team effectively, setting achievable targets, and ensuring the overall success of the sales department.

## **Process:**

* **Data Collection**: Gather sales data through PowerBI, including orders, location, customers, returns, and users.
* **Data Preparation**: Clean and organize the data to ensure it is in a format that is suitable for visualization. This involves adding a calendar table, transforming, and merging data, and creating data models to establish relationships.
* **Design and Data Visualizations**:
* Sales Performance Visualizations:

1. States sales performance

Create a map to showcase the top-performing sales states. Utilize a gradient color scheme, ranging from dark to light green, to highlight the leading states. Additionally, offer filtering options to explore the regions in more detail.

1. Products, Managers, and Customers sales performance

Use bar charts to rank products, managers, and customers by sales performance. This will provide a clear view of the top performers in each category. It also provided tooltips to view the profits.

* Trends and Relationship Visualizations:

1. Trends and patterns

Utilize line charts to visually represent time series data for sales and profit, illustrating the fluctuations in sales and profits over time This assists in identifying periods of high demand and specific months and days of the week when sales and profit increase.

1. Relationship Analysis

Use scatterplot to analyze the relationship between sales and profit. Identify exceptional product performers that drive both sales and profit growth, while also recognizing products with high sales but lower profit. and use this insight to optimize product and pricing strategies.

* Monitor KPIs Visualizations

1. Monitor KPIs Visualizations: Create a card visualization with yellow color to track key metrics value such as profit, sales, returns %, avg margin %, and avg discounts %. This will offer a simple and concise way to present essential KPIs, allowing viewers to quickly understand the metrics. It enables the display of summary-level data in a compact and visually appealing format for easy reference.

* Interactivity: Allow viewers to click on different sections of the visualization to refresh the data. Provide options by filtering the date, managers, regions and returns.